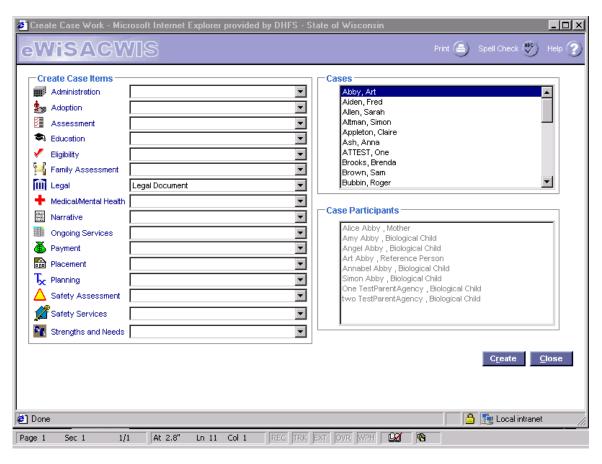
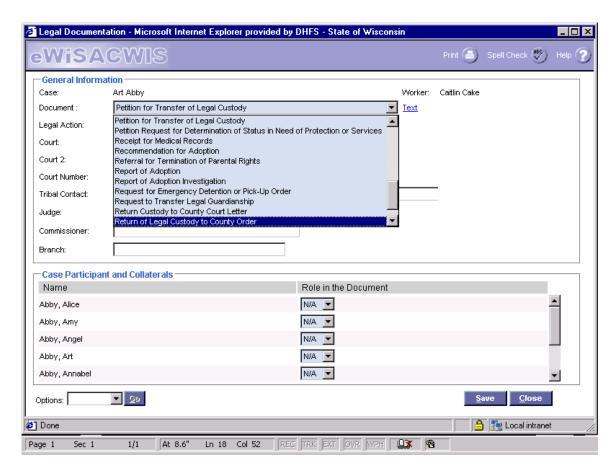
Creating A Legal Document

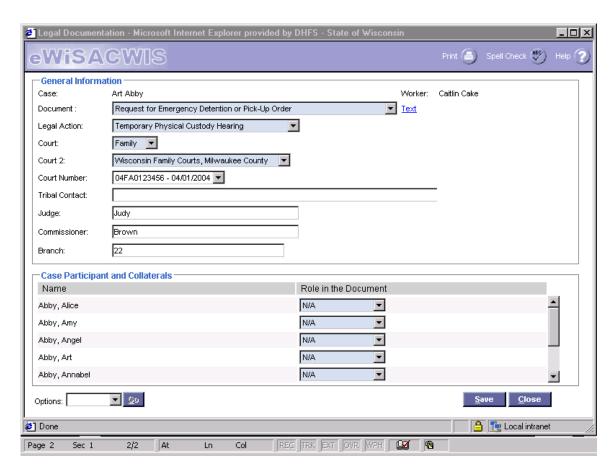
- 1. To Create a Legal Document from your Desktop go up to Create>Casework. The Create Casework Page will appear.
- 2. Select Legal Document from the Legal category and select the family that the document applies to. You will not be able to select a participant. That will be done on the Legal Document page.
- 3. Finally, click on the Create button to open the Legal Document page.



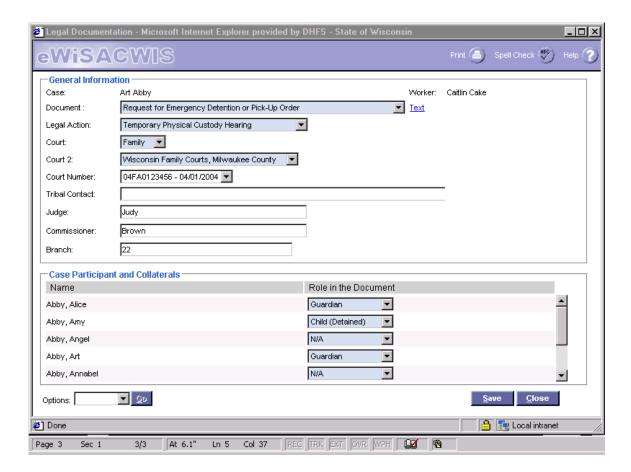
- 4. The case name and worker name will pre-fill at the top of the page.
- 5. The Document field consists of a drop down value list. Pick the appropriate value for the document that you want to create. Notice the Text Hyper link next to the Document field. This will be explained at the end of this Quick Reference Guide.



- 6. The Legal Action field consists of a drop down value list. Pick the appropriate value for the document you want to create.
- 7. Court refers to the type of court this case will be heard at. Court 2 refers to the county of jurisdiction.
- 8. The Court Number in most cases (unless the court number was not entered on Legal Action) is a drop down value. Select the Court Number that coincides with the action you are taking. By selecting the Court Number from the drop down list, the Tribal Contact, Judge, Commissioner, and Branch will pre-fill with the information that was entered on Legal Action. The Tribal Contact, Judge, Commissioner, and Branch can be updated at anytime.



9. In the Case Participant and Collateral's Box, it is important to identify the Legal Guardians of the child and the Child whom this document pertains to. The Role in the Document section has drop down values from which to select. Roles will determine how the system will pre-fill items in the text document.



- 10. The Text Hyperlink next to the Document Category will open the text document. It is important that the child's person management record is complete in order for this document to pre-fill properly. If demographic items do not pre-fill go back to the person management record. Fields which are meant to pre-fill will not allow the user to entire text on the document. If you are having difficulty determining which fields pre-fill, go to the Template Mapping Guides on the eWiSACWIS Knowledge Web.
- 11. When the Legal Document is finished, click on Options, select Approval, and click Go. You need to Approve all Legal Documents and submit them for supervisory approval.